

# Jordan Financial Privacy Policy *Updated November 2024*

Jordan Financial Life Planning maintains client information in a secure, private manner and does not share data with outside parties, even attorneys, accountants, lawyers or other securities professionals, unless so authorized by the client. We do not sell or rent your personal information. Client relationships with Jordan Financial, including conversations, e-mails, texts, correspondence and meeting notes, are kept confidential, unless otherwise directed or authorized. We never share client or prospective client data with third parties for marketing or promotional purposes. Original or photocopied paper documents that have been electronically stored are shredded or returned to the client.

## **Information Collected**

Pertinent information that we may request, and in compliance with securities regulations, may include names and addresses, email address, contact and employer information, tax identification numbers and statements regarding assets, liabilities, income, tax returns and other relevant information sources. Companies that we hire to provide custodial services or other business support are not allowed to use our clients' personal information for purposes other than that which we hire them to provide. Employees and our professional service representatives are

required to comply with our information protection guidelines. Jordan Financial has policies and procedures that limit employee access to your information to those with a business reason. We educate our employees about the importance of confidentiality and customer privacy and take measures to enforce our privacy practices.

## **Updating Information**

If your information needs to be updated, please contact us so we can maintain accurate records. We will periodically ask you to verify current information in the course of our business relationship. You may review and update the personal information maintained about you in our electronic files at any time to ensure accuracy.

## **Coverage and Collection**

Jordan Financial offers many services, some of which are available through organizations such as financial custodians, banks, credit unions, brokerage firms, internet portals, and others. This Privacy Policy applies only to financial consulting, investment management, and other services offered directly by Jordan Financial. Our services offered through other organizations comply with the policies of those organizations. We may collect information about you from the following sources:

- Fact-finding forms, investment applications or similar formats;
- Your use of our website and the services offered through it, including data transmitted to us through cell phones or other mobile devices. [We use optional opt-in language for you to receive text messages from us: *"I grant Jordan Financial the ability to send relevant text messages to the phone number provided. Texting messaging rates may apply. Message frequency may vary. Reply STOP at any time to unsubscribe from text messages."*]
- Companies that provide content, such as account custodians, to our website, or that use Jordan Financial's electronic funds transfer and/or electronic payment services at their sites;
- Other sources as allowed by law.

## **Internet Information**

When you visit our website and leave a comment or question, we receive certain standard information that your browser sends to every website you visit, such as your IP address, browser type and language, access times and referring website addresses. This data does not identify you uniquely but is used to assist in "authenticating" your identity

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and when you access the website.

We may receive additional information about your visit, including the pages you view, the links you click and other actions. This data is used to make our website design more efficient. Like most websites, ours uses cookies (small text files placed on your computer by the web server when you visit). Most cookies are session cookies used for a specific period while you are on our website, but a few may be "persistent" cookies that stay on your hard drive and are read by the web server when you return to our site. Our website technology may use cookies to store your preferences and other information on your computer, thus saving time by eliminating the need to repeatedly enter the same information and display your personalized content on subsequent site visits.

Cookies cannot and will not be used to deliver or run programs on your computer. Most web browsers automatically accept cookies, but you can modify your browser setting to decline them. If you choose to decline cookies, you will not be able to sign in or use other interactive features of our website that depend on cookies.

## ***How Your Data is Used or Disclosed***

We may use and disclose your personal information (including

limited disclosures to non-affiliated third-party service providers doing services on our behalf) for the following purposes:

- To complete transactions and render services authorized by you (e.g., sharing information with a financial firm or other provider to allow it to authenticate you, obtain information and send messages to you related to the authorized services);
- To send you information about additional services that have or will be offered by Jordan Financial and others; you may opt out of receiving commercial email messages from us by replying STOP in the Subject Line of any email originating from Jordan Financial;
- To comply with laws and regulations, including compliance with court orders or lawful instructions from a government agency, to protect the personal safety of subscribers or the public, to defend Jordan Financial from claims, and to protect Jordan Financial's rights and property; and as otherwise authorized by the client.

## ***How Your Information Is Kept Secure***

To ensure that your information remains confidential, Jordan Financial uses, through its affiliates, Secure Sockets Layer (SSL) technology to transmit and receive information in an

encrypted form. Additionally, we maintain physical, electronic, and procedural safeguards to help prevent unauthorized access to your information. We update and test our technology frequently.

## ***Protection for Prospective or Former Clients***

We treat the personal information of our prospective and former clients with the same care and respect as that of our current clients.

## ***Compliance and Access***

Jordan Financial complies with applicable laws and regulations pertaining to information about you, including federal laws pertaining to "nonpublic personal information" and "consumer report information." Jordan Financial uses and discloses those types of information only as permitted by applicable law and described in this Privacy Policy. The most current version is on our website. For a printed copy or if you have questions, please contact us:

In writing:

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Kenosha, WI 53142

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